



**Migration Module**

**Application User Guide**

**August 2009**

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## **About this Guide**

This document is usually intended for use of a project supervisor. Typical tasks for such persons include delegation of tasks and overseeing the progress of the document types. These document types should be configured by an administrator prior to the start of the capture process. Refer to the Administrative Guide as necessary for information relating to configuration.

## **About PSIGEN Software, Inc.**

PSIGEN Software is a fast growing, privately held, provider of document capture and retrieval software solutions. Our product lines address production capture, distributed capture, web based retrieval, including the Microsoft SharePoint platform. Our largest customers include scanning service providers, business process outsourcers, and the corporate services divisions of Fortune 500 corporations. We have significant customer concentration in financial services, healthcare, and manufacturing. Our channel partners include document imaging value added resellers, major brand MFP dealers, Microsoft solution providers, and document management software vendors.

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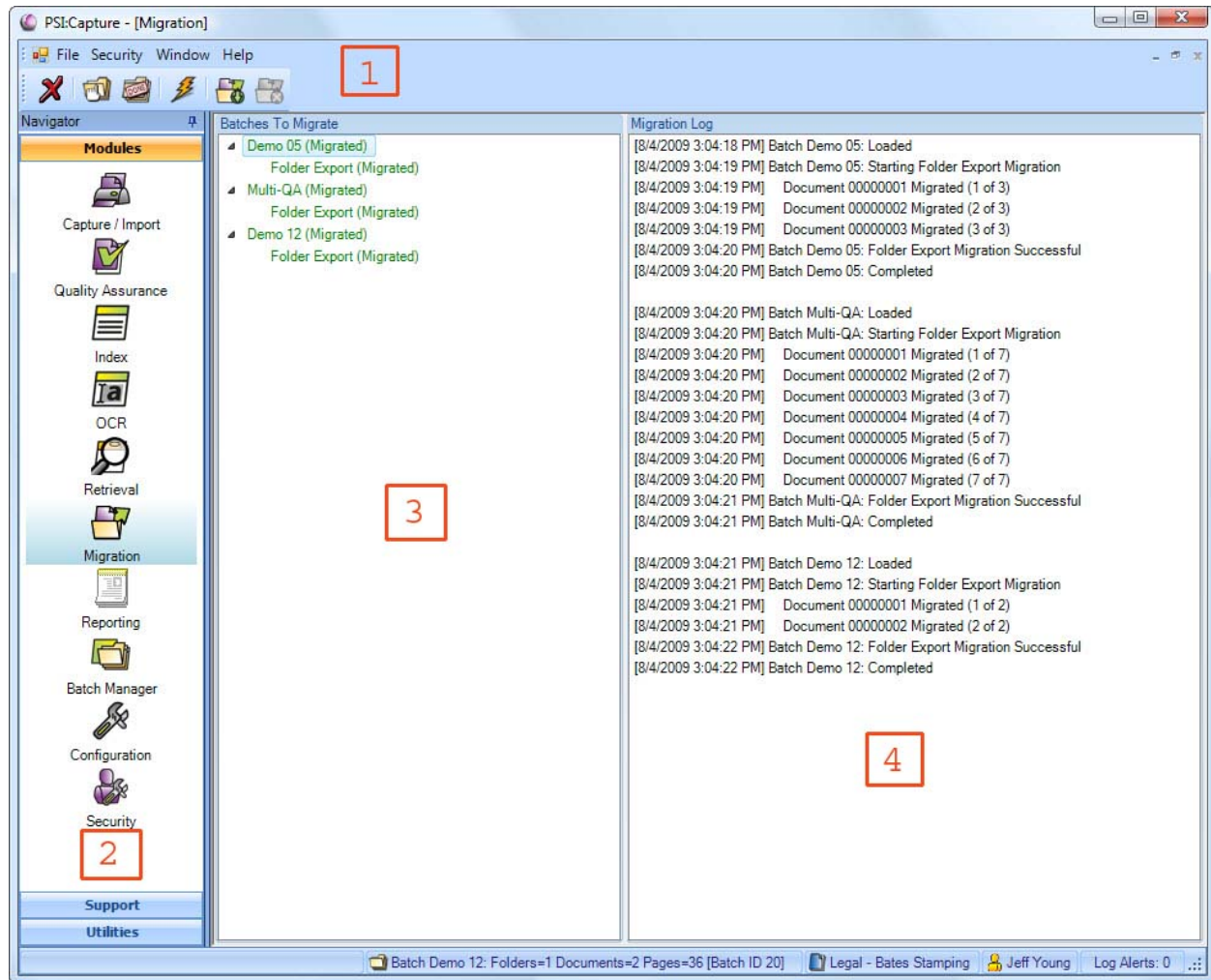


## **Migration Module Overview**

The migration module provides options for moving document images and metadata to file folder formats, database formats, and content management systems. Two general types of migration formats are supported: 1) Direct and 2) Flat file. The direct type migration options move images, metadata, and OCR text directly into the target content management system or Database. The metadata and OCR text function as index values for image retrieval and Document Management systems. The Flat file migration types which include delimited ASCII, formatted delimited ASCII and XML formats. The Database migration creates a standard MS SQL Server 2005 database or Access 2003 database where each index field name is a column, the index values are rows in the table, and the final column of the database table is the path to the drive/directory of the image file associated with each row of index values.

## User Interface Overview

The PSI:Capture interface is divided into different functional areas as seen in the layout below. These panes of the user interface will be referenced throughout this manual.



1. Toolbar Banner
2. Navigator Pane
3. Batch Queuing Pane
4. Migration Log

## Toolbar Banner

### Migration Toolbar



**Close Module** – Closes out the current module.



**Select Batch** – Opens the Batch Manager list for selection of existing batches for processing.



**Close Batch** – Brings up the “Close Batch” dialog box.



**Toggle Auto Processing** – Enables and disables automatic Migration.



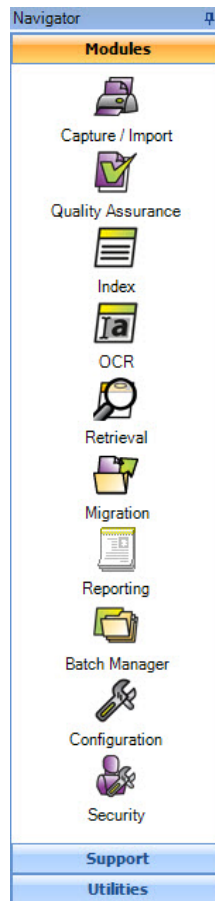
**Start Migration**– Begins the Migration process.



**Stop Migration** – Stops the Migration process.

## Navigator Pane

Navigator Pane can either be pinned to the desktop (default) or set to auto hide.



### Modules Tab

**Capture / Import** – Opens the Capture/Import module.

**Quality Assurance** – Opens the Quality Assurance module.

**Index** – Opens the Index module.

**OCR** – Opens the OCR module.

**Retrieval** - Opens the Retrieval module. **NOTE:** Availability dependent on license options.

**Migration** – Opens the Migration module.

**Reporting** – Opens the Reporting module.

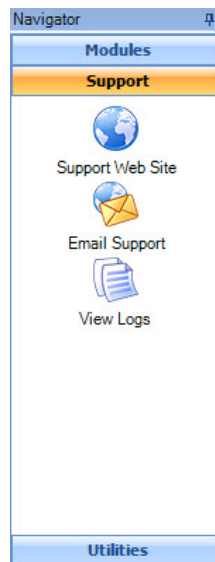
**Batch Manager** – Opens the Batch Manager module.

**Configuration** – Opens the Configuration module.

**Security** – Opens the Security module.

### **Support Tab**

Contains links to support website, support email, and view logs.



### **Support Web Site**

Opens the default web browser to [www.psigen.com/support](http://www.psigen.com/support)

### **Email Support**

Opens the default mail service for user to compose an email to [support@psigen.com](mailto:support@psigen.com).

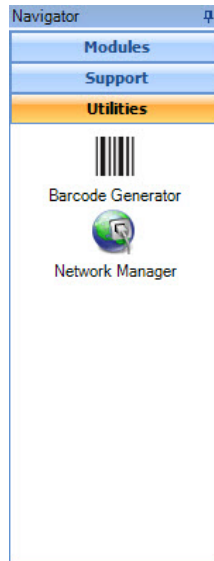
### **View Logs**

Displays a list of logs containing all PSI:Capture modules.



## Utilities Tab

Contains Barcode Generator module and Network Manager.



### Barcode Generator

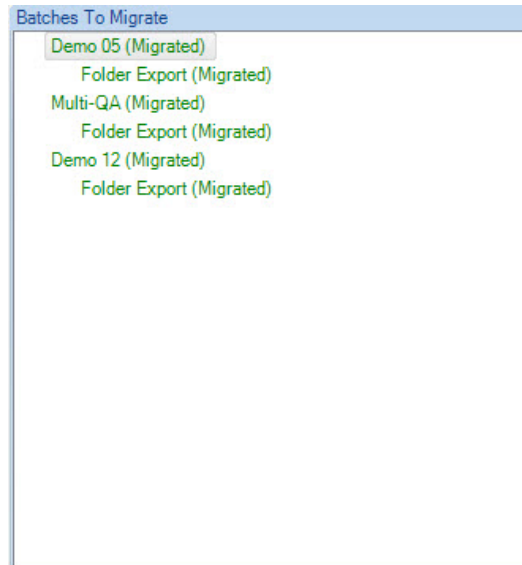
Opens up a utility for users to create/save/print custom separator/indexing barcode sheets.

### Network Manager

Allows user to manage the port and IP settings for PSIGEN Platform Services and License Server.

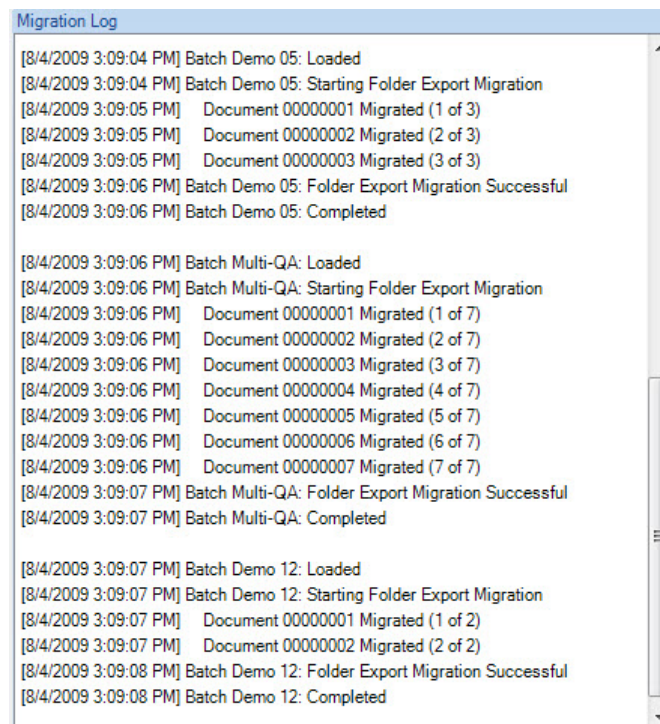
## Batch Queuing Pane

Batch(es) currently loaded are listed here. When migration is complete on a batch, it will turn green.



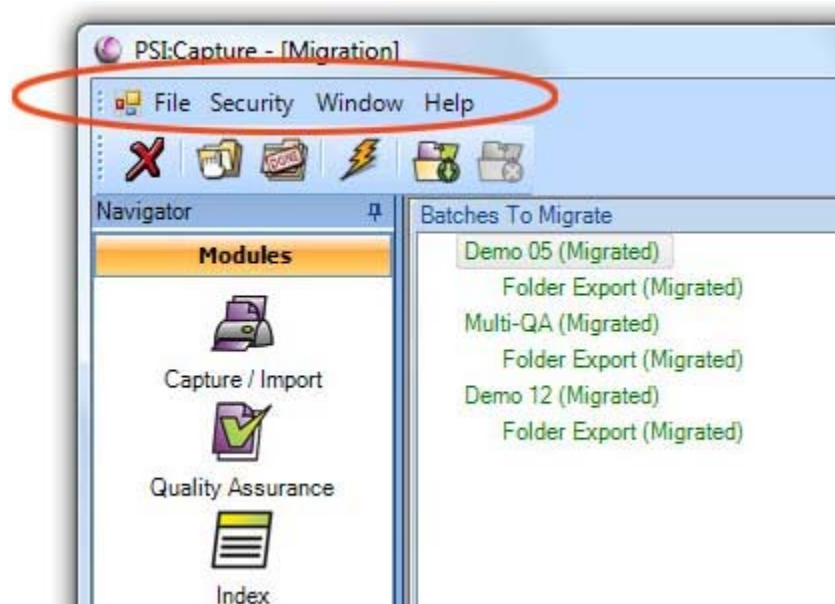
## Migration Log

A timestamp of when each batch and document is loaded, processed, and completed.



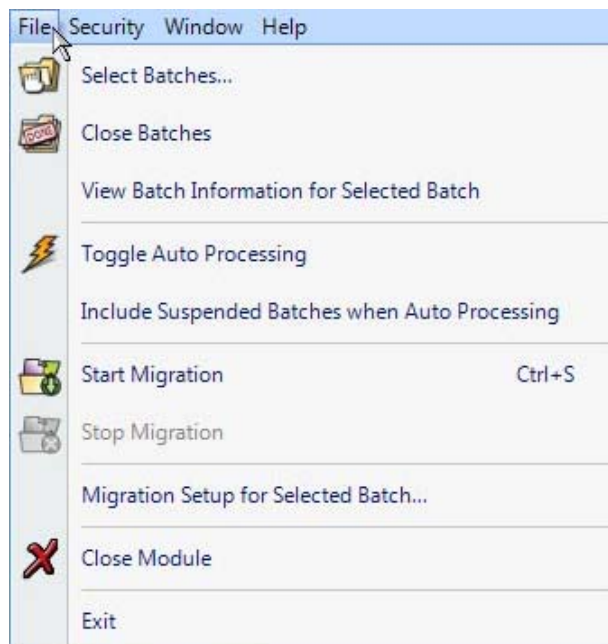
## Menu Bar

Contains drop-down menus: File, Security, Window, and Help.



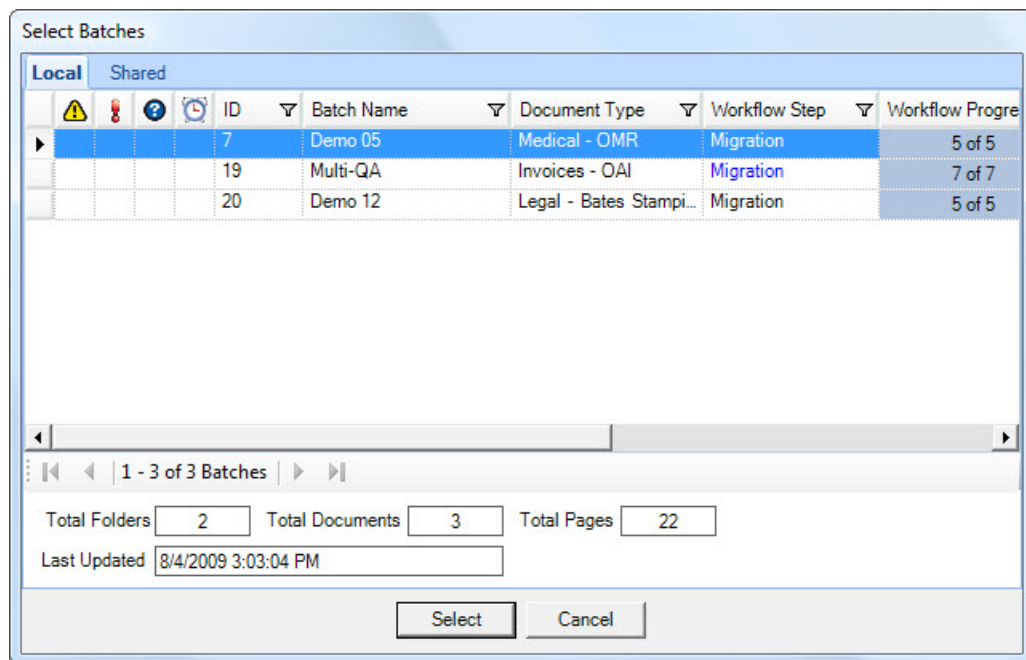
## File

Contains numerous commands, specific to the Migration module.



## Select Batch

The “Select Batch” dialog box is brought up, and user is asked to make a selection from the list then hit "Select". All (local/shared) batches currently in the Migration workflow step are displayed here. If a batch is currently open, the user will first be prompted to close or suspend the batch.

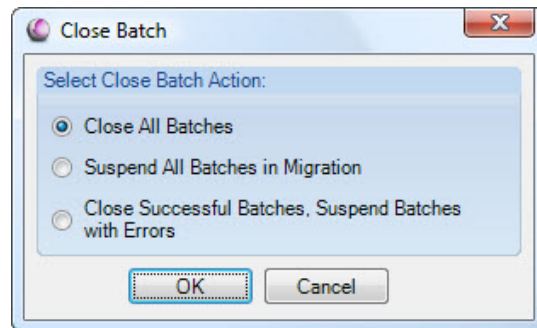


## Local/Shared Tabs

A document type set as a “Local” will show all batches in the “Local” tab if it was created on that workstation. A document type set as part of a multi-station deployment would typically be configured as a shared batch, and therefore found in the “Shared” tab.

## Close Batch

Brings up the “Close Batch” dialog box. Prompts user to select one of three options.



## Close Batch

Closes the current batch. If there are more batches to migrate, the user stays in the Migration module, and the “Select Batch” dialog box comes up.

## Suspend All Batches in Migration

Suspends all batches in the Migration workflow step for processing at a later time. The Migration module remains open, and the “Select Batch” dialog box comes up.

## Close Successful Batches, Suspends Batches with Errors

The completed batches are closed, and erroneous batches are suspended.

## View Batch Information for Selected Batch

Opens the “Batch Information” dialog box. The button for “Modify Document Type Definition” as well as the “Batch Overrides” tab will not be available.

### Main

Information on Batch Name, Batch Fields, Batch Totals, and Batch Summary are displayed. The user cannot change the batch to “High Priority” at this point, but a batch can be held by checking the “Hold Batch” box. A batch on hold will no longer be listed in the Select Batch dialog box.

Batch Information (Batch ID: 8)

Main Batch Overrides Batch Note Batch History Document Type Summary

Batch Name: Demo 06 ☐ High Priority Batch

Workflow Step: Index ☐ Hold Batch

Batch Fields

No Batch Index Fields Defined

Batch Totals

Total Folders 1 Total Documents 5 Total Pages 7

Batch Summary

Document Type: Invoices - OAI

Batch Folder: E:\Capture Storage\Invoices - OAI\Demo 06

Created: 7/28/2009 4:35:14 PM

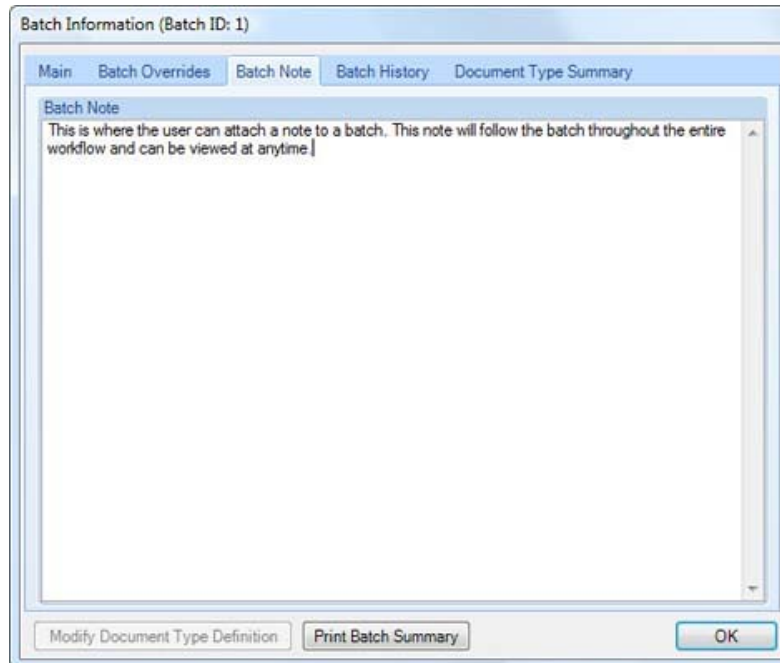
Modify Document Type Definition Print Batch Summary OK Cancel

### Batch Overrides

This tab is unavailable.

## Batch Note

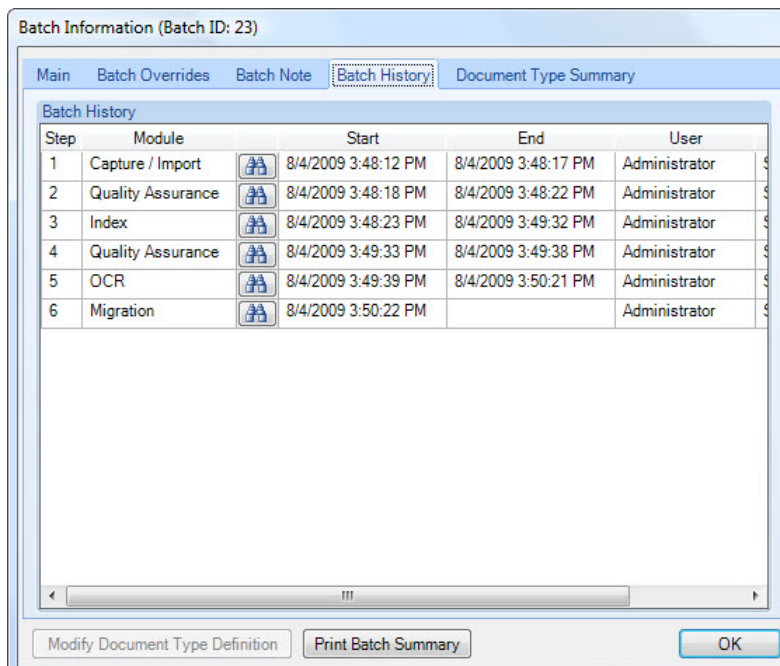
Allows the user to attach/view a note to the batch. The note will stay with the batch, and can be viewed at anytime.



The screenshot shows the 'Batch Information (Batch ID: 1)' window with the 'Batch Note' tab selected. The tab bar includes 'Main', 'Batch Overrides', 'Batch Note', 'Batch History', and 'Document Type Summary'. The 'Batch Note' tab contains a text area with the following text: 'This is where the user can attach a note to a batch. This note will follow the batch throughout the entire workflow and can be viewed at anytime.' At the bottom of the window, there are three buttons: 'Modify Document Type Definition', 'Print Batch Summary', and 'OK'.

## Batch History

Shows the history of the batch with a date timestamp.



The screenshot shows the 'Batch Information (Batch ID: 23)' window with the 'Batch History' tab selected. The tab bar includes 'Main', 'Batch Overrides', 'Batch Note', 'Batch History', and 'Document Type Summary'. The 'Batch History' tab displays a table with the following data:

Step	Module	Start	End	User
1	Capture / Import	8/4/2009 3:48:12 PM	8/4/2009 3:48:17 PM	Administrator
2	Quality Assurance	8/4/2009 3:48:18 PM	8/4/2009 3:48:22 PM	Administrator
3	Index	8/4/2009 3:48:23 PM	8/4/2009 3:49:32 PM	Administrator
4	Quality Assurance	8/4/2009 3:49:33 PM	8/4/2009 3:49:38 PM	Administrator
5	OCR	8/4/2009 3:49:39 PM	8/4/2009 3:50:21 PM	Administrator
6	Migration	8/4/2009 3:50:22 PM		Administrator

At the bottom of the window, there are three buttons: 'Modify Document Type Definition', 'Print Batch Summary', and 'OK'.



By clicking on the binocular icon the “Batch History Item Details” statistics on a selected workflow are shown.

A screenshot of a Windows-style dialog box titled "Batch History Item Details". It contains a section titled "Migration Statistics" with a table of data. At the bottom is an "OK" button.

Migration Statistics	
Migrations Performed	1
Documents Migrated	7
Start Migration	8/4/2009 3:09:06 PM
End Migration	8/4/2009 3:09:07 PM

## Document Type Summary

A brief summary of the document type configuration settings presented in a tree structure.

A screenshot of a Windows-style dialog box titled "Batch Information (Batch ID: 10)". It has a tabbed interface with tabs for "Main", "Batch Overrides", "Batch Note", "Batch History", and "Document Type Summary". The "Document Type Summary" tab is active, showing a tree structure of configuration settings. At the bottom are buttons for "Modify Document Type Definition", "Print Batch Summary", "OK", and "Cancel".

Batch Information (Batch ID: 10)

Main Batch Overrides Batch Note Batch History Document Type Summary

Document Type Summary

- General Information
- Separation
- Recognition
- Index Fields
- Advanced Indexing
- Image Processing
- Workflow

Modify Document Type Definition Print Batch Summary OK Cancel



## Toggle Auto Processing

When enabled, any batches ready for Migration will be automatically processed.

## Include Suspended Batches when Auto Processing

Chose whether batches suspended in the Migration workflow step can be automatically processed.

## Start Migration

Begins the Migration process.

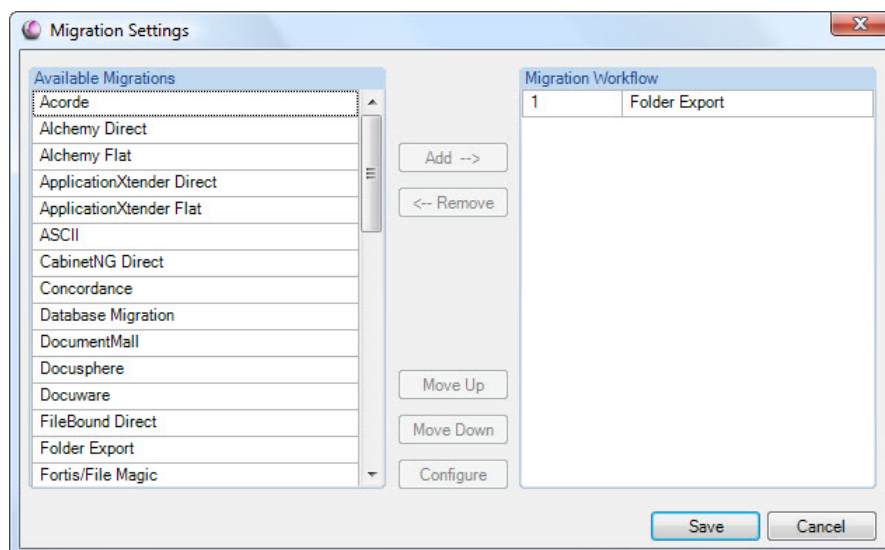
## Stop Migration

Stops the Migration process.

## Migration Setup for Selected Batch

The “Migration Settings” dialog box is shown. The following products or format types are supported:

Acorde, Alchemy, Application Xtender, ASCII (text), CabinetNG, Concordance, Database (MS-Access, MS-SQL, Oracle), DocumentMall, Docusphere, Docuware, FileBound, Folder (Windows) Export, Fortis/File Magic, IBM Content Manager On Demand, InfoDynamics Intact Smart, LaserFiche, M3 AccKnowledge, MarkView, MS-SharePoint, OnBase, PaperVision/Image Silo, SentryFile, SIRE, SpringCM, SQN Sentry, Stellent, Summation, ViewWise and XML. See “Migration Workflow Configuration” in the Administrative Guide for more details.



**Close Module**

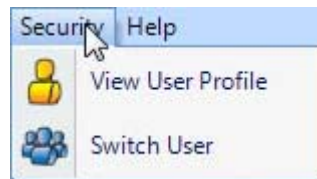
Closes the Migration Module. **NOTE:** If a batch is currently open, user will be prompted to close or suspend the batch. PSI:Capture will remain open.

**Exit**

Exits out from PSI:Capture. **NOTE:** If a batch is currently open, user will be prompted to close or suspend the batch. The PSI:Capture application will then end.

## Security

Contains commands relevant to security in PSI:Capture.



### View User Profile

Opens the View User Details dialog box.

### View User Details

#### Properties

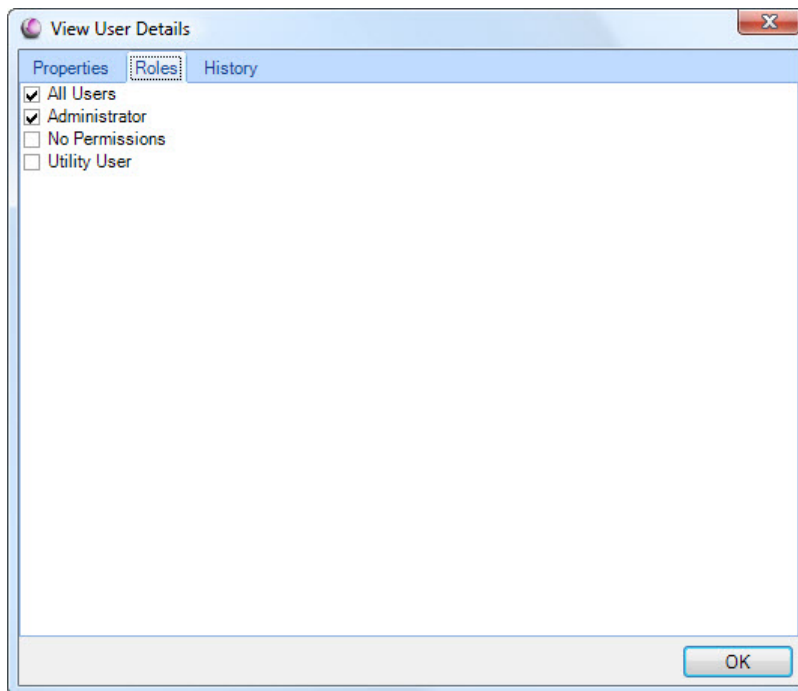
Displays details about the current user.

A screenshot of the 'View User Details' dialog box. The dialog has three tabs: 'Properties' (selected), 'Roles', and 'History'. The 'Properties' tab contains a list of user details in a table-like format. At the bottom right is an 'OK' button.

Field	Value
User Name	Administrator
First Name	System
Last Name	Administrator
Display Name	System Administrator
Email	
Comment	
Type	Application
Status	Online
Created	7/21/2009 4:28:13 PM
Last Login	7/31/2009 8:51:00 AM
Last Activity	7/31/2009 8:51:01 AM

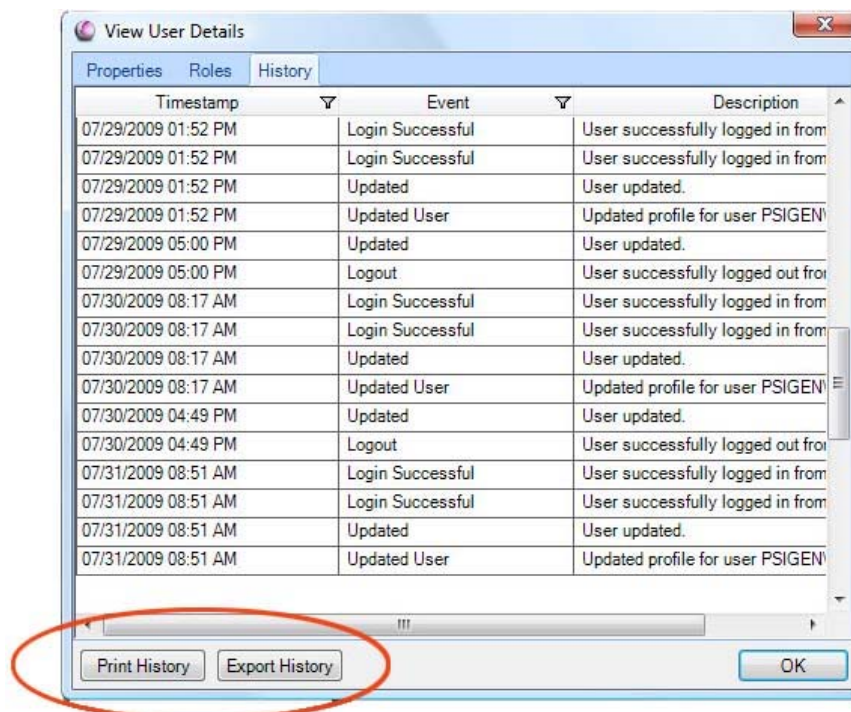
#### Roles

Displays the current user's role settings as dictated by the administrator. See "Roles" in "Security Module" in the User Manual.



## History

Displays the history of the user's login activity in PSI:Capture.

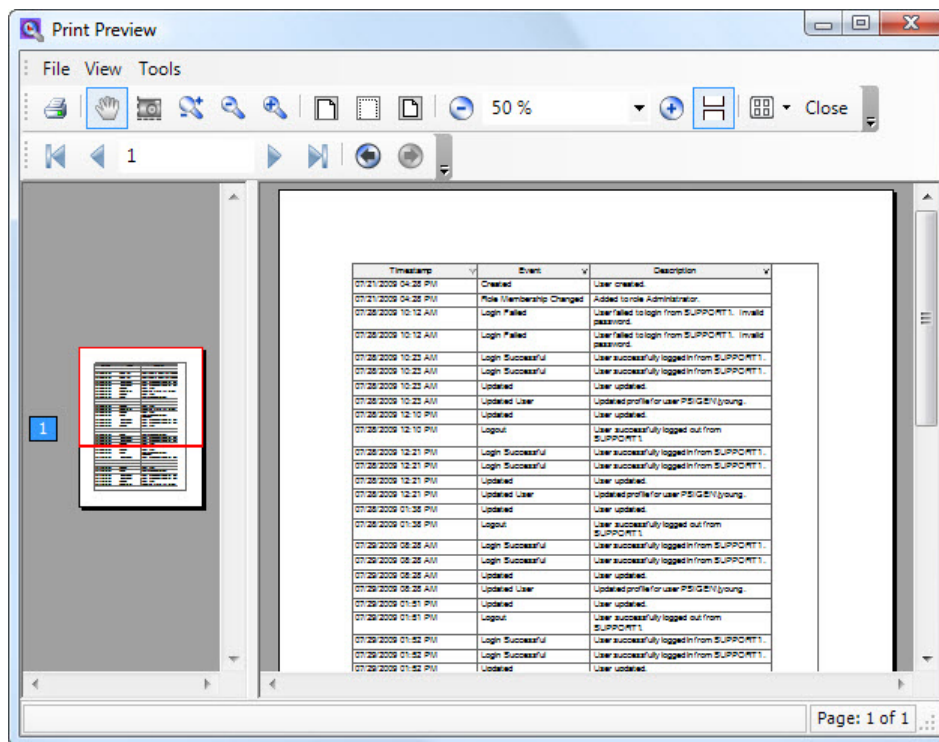


## Print History

Opens the Print Preview window.

## Print Preview

Displays the standard functions for viewing and printing, such as zoom options and page setup.

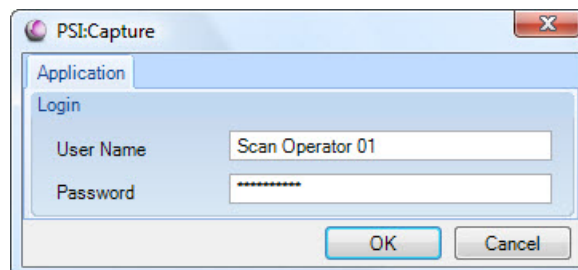


## Export History

Exports the login history in a Microsoft Excel Workbook file. This allows user to save the log to a desired location.

## Switch User

Logs out the current user out from the PSI:Capture, and allows an alternate log in.

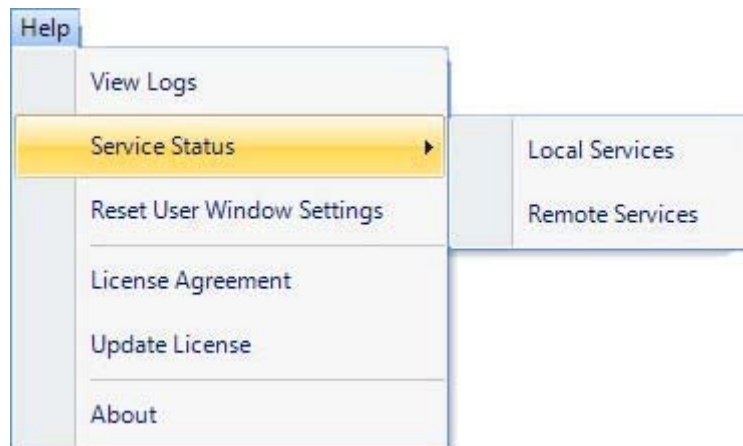


## Window

This menu item is unavailable in the Migration module.

## Help

Contains information and details about PSI:Capture.



### View Logs

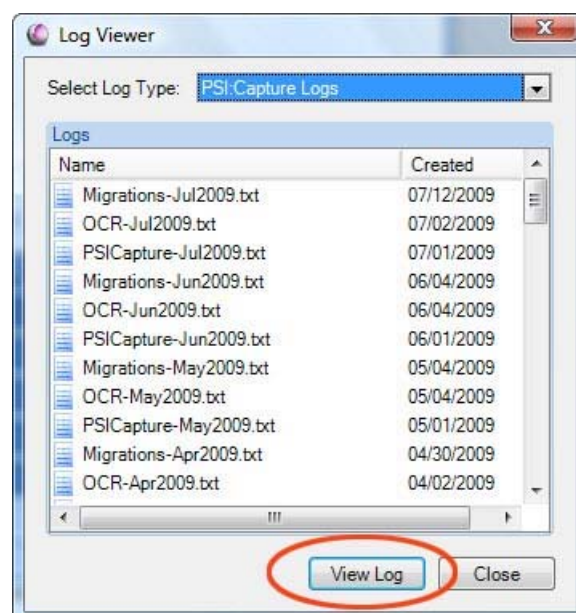
User can select either PSI: Capture Logs or Platform Service Logs.

### Log Viewer (PSI:Capture Logs)

Displays a list of logs containing all PSI:Capture modules.

### View Log

Pressing this button brings up the log in your default text file viewer.

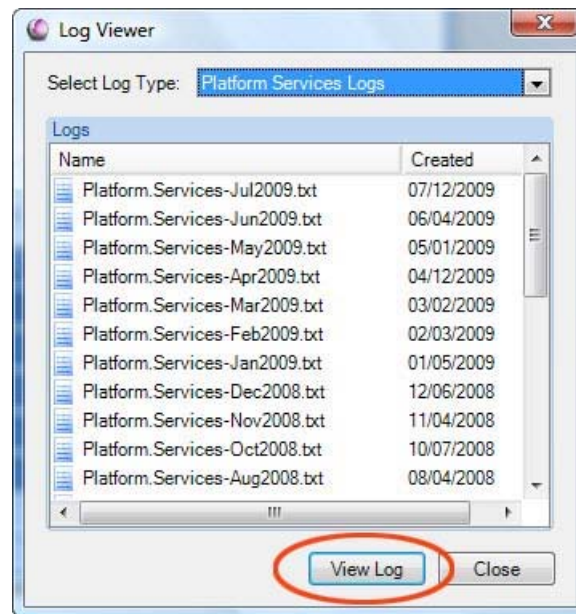


## Log Viewer (Platform Services Logs)

Displays a list of logs for Platform Services.

### View Log

Pressing this button brings up the log in your default text file viewer.



## Service Status (Local Services / Remote Services)

Shows the version and current status of the services.

### Reset User Window Settings

Resets the Window settings to default.

### License Agreement

Displays PSI:Capture License Agreement

### Update License

Updates PSI:Capture License with the License Server.

## **About**

Shows PSI:Capture copyright information, maintenance expiration date, installed modules/assemblies, and license agreement.